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Mexico

Exporter Guide

Annual Report 2011

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Report Highlights:

Exports of consumer oriented products to Mexico reached almost $6.50 billion in 2010, a reflection that, under NAFTA, Mexico has become one of the largest and fastest growing markets for U.S. agricultural products. With the advantage of a large shared land border and duties eliminated on all consumer oriented food products, Mexico is a natural market for U.S. exporters.

Post:
Mexico City ATO

Executive Summary:
Mexico is the United States' third largest export market. This Exporter's Guide offers exporters, both new to the market and those with previous experience in Mexico, an overview of the Mexican market, a guide on local business practices, recommendations on how to seek business opportunities and a description of the best product prospects.

Author Defined:
This report is for informational purposes only to assist exporters of U.S. food and agricultural products in their sales and promotional efforts in Mexico. U.S. exporters should take normal commercial precautions when dealing with any potential business contact, including checking references.

SECTION I. MARKET OVERVIEW

The Mexican market continues to be a growth market that represents one of the best opportunities in the world for U.S. food products. Mexico's top trade partner is by far the United States, who imports 75% of all Mexican exports and provides Mexico with 61% of total Mexico imports.

Under NAFTA, Mexico has become one of the largest and fastest growing markets for U.S. agricultural products. U.S. agricultural fish and forestry exports have tripled since the onset of NAFTA in 1994. Furthermore, U.S. agricultural and food exports to Mexico have been climbing at an average rate of almost 10% per year. Since 2003 duties have been eliminated on virtually all consumer oriented food products.

Total U.S. agricultural, fishery and forestry exports to Mexico for CY 2010 almost reached $16 billion, recovering after the slump created by the global recession in 2009. Meanwhile, imports from Mexico surpassed a record $14 billion in 2010. From January to October 2011, U.S. exports to Mexico are up 27%, while Mexican exports to the U.S. are up 17% from the previous year. Two-way trade in agricultural, forestry and fisheries products is now over $30 billion.

In 2010, the United States' major agricultural exports to Mexico were: coarse grains ($1.98 billion), red meats ($1.61 billion), soybeans ($1.49 billion), dairy products ($823 million), poultry ($665 million), cotton ($608 million) and sugar/sweeteners ($606 million). Meanwhile, Mexico exported almost $6 billion in fresh fruits and vegetables, which accounts for approximately 42% of the value of total Mexican exports to the United States. Other significant Mexican exports were: wine & beer ($1.6 billion) and snack foods ($1.25 billion).

The United States has a competitive advantage when it comes to Mexico. Sharing a 2,000 mile-long border and with over 45 border crossings, the United States is the natural supplier in this just-in-time delivery market. In addition, the close proximity has made the tourism and restaurant sectors a dynamic sector for U.S. exports. Traditional tourist spots like Cancun, Acapulco and Los Cabos are recovering from the 2009 recession and new destinations like Puerto Vallarta, Manzanillo and the Mayan Riviera are booming with new visitors. Most international tourists are North Americans and, to a large degree, like to consume familiar products.

Despite the economic crisis of 2009, Mexico has managed to keep stable and has recovered its positive rates of growth, reaching an estimated GDP growth of 5.5% in 2010. Although still shattered, Mexican consumers have regained a good proportion of their disposable income and have begun to increase their consumption of food and beverages.

Demographically, Mexico is experiencing a population growth of almost 2%, adding to the current population of over 112 million; 64% of the population is under the age of 35 and 78% of the population resides in urban areas. These consumers are more familiar, and thus oriented towards U.S. products; therefore, these demographic changes in Mexico bode well for increasing exports.

Women continue to join the workforce in larger numbers, which leads to increased demand for consumer-ready food products. Urban women in particular are shifting to healthier lifestyles for themselves and their children and are thus shifting their food consumption patterns to a more U.S./European style. These trends are also impacting food distribution and food consumption in restaurants and hotels. This definitely helps sales of imported and usually higher value products.

Advantages and Challenges for U.S. Exporters in Mexico

Advantages	Challenges
• All U.S. products can enter Mexico tariff-free. • Mexican consumers recognize U.S. brands and labels and associate them with high, consistent quality and value, while Mexican retailers are very familiar with U.S. retail practices. • Population in urban centers is growing and the rate of employment among women is continuing to grow. • Proximity to the U.S. keeps transportation costs to Mexico low. • The Mexican peso continues to be relatively stable in its relation to the U.S. dollar, making unexpected price fluctuations less likely. • Major retailers are developing increasingly sophisticated distribution systems, which will provide more space and better cold chain technology for high value imports. • Local investment from restaurant chains continues to grow. • Continued growth in almost all of the processed food industry in Mexico, will increase the need for inputs. • Industry practices are becoming more sophisticated ensuring cold chain distribution for wider penetration nationwide. • Greater knowledge about organic products is	• Mexico's security situation continues to be a concern, threatening national security, although business practices are adapting to this condition. • Mexican consumers are price sensitive, and imported products in general are higher in price, and the demand for imported products depends also on the availability of certain food products. • Transportation and distribution methods inside Mexico are undeveloped in many regions. • Phytosanitary and technical barriers and labeling requirements can cause border crossing problems and delays as Mexican import regulations can change rapidly and without notice. • Mexico is the country with the most free trade agreements in Latin America, opening the door to many third-country competitors. • Mexican retailers are demanding more often that products be delivered locally with local servicing and attention. • Lower end, smaller supermarkets and convenience stores are the fastest growing segments in retail, which are not primary locations for high-end U.S. products. • Local producers and food processors are rising to the challenge of producing quality goods with an increase in variety, learning, and adapting to

opening new product opportunities at the retail level; likewise, increased awareness of obesity issues is creating greater demand for healthy products. • Sharing a land border with over 45 crossings, gives U.S. exporters a competitive advantage over third country suppliers.	growing demands. • Mexico exports large volumes of organic produce, offering direct competition to American organic producers. • Mexico is prone to use SPS measures to protect a few sensitive commodities.

SECTION II. EXPORTER BUSINESS TIPS

Business Culture

Personal relationships are essential to Mexican business relationships. Mexicans attach great importance to courtesy in all business endeavors. A warm handshake combined with conversation about the person's well being, family, or other similar topics prior to launching into any conversation related to business is considered a common courtesy. The concept that "time is money" should be left at the border and, though Mexican businesses are also conscious of the bottom line, courtesy and diplomacy are more important values to most Mexicans than getting immediately "down to business".

Personally visit your potential clients in Mexico. If a current or potential Mexican client visits you in the United States, you are expected to wine and dine him. You will be accorded similar treatment when visiting Mexico.

Market trends

1. Traditional retail sales and marketing chains are changing rapidly.
2. Mexican consumers now are searching for more convenient food and foodservice alternatives.
3. The addition of women in the labor force adds further to disposable household income to allow for the purchase of products previously perceived as too expensive.
4. Mexicans are loyal to brands and buy them even if the price is slightly higher.
5. Supermarkets are more and more interested in buying directly from suppliers, bypassing traditional distributors.
6. Retail expansion in both rural and small communities is creating new markets for consumer products, restaurants and entertainment services are following.
7. New legislations limit smoking in almost every public area (affecting the HRI industry) and prohibiting the sale of unhealthy food in public schools (affecting food manufacturers/processors) and possibly having an indirect effect on imports.
8. More young professionals and college students are driving an increase in the sale of products like beer and snacks and consumption in fast-food and dining-out establishments.
9. Rise in urbanization is pushing up sales of packaged food and ready-to-eat meals, and creating new markets for catering and fast-food services.
10. Food processors will increase their supply of health and wellness packaged foods, such as cereals, processed fruits and vegetables and yoghurt.
11. Safer packaging options to allow children to handle products on their own, smaller packaging options geared towards younger consumers as well as less affluent consumers, in prepared or ready-to-eat meal substitutes and products with easy preparation, such as microwaveable products.

12. Mexicans indulge themselves and usually grant themselves affordable goods like whiskey and a fancy dinner on special occasions.

Entering the Mexican Market

U.S. exporters should consider contacting local distributors/importers as an important early step in their efforts to establish themselves in the Mexican market. A good distributor should promote sales and make sure that the imported products are available at points of sale. It is essential to maintain close contact with your representative, especially regarding changes in import procedures and documentation.

Recommendations

- Carry out market research, not only in terms of typical market research, but also in finding appropriate business contacts and thoroughly reviewing Mexican import regulations in order to successfully seize market opportunities and overcome market challenges.
- Participate in and/or attend Mexican trade shows, particularly U.S. pavilions organized at selected shows. A show can serve as a way to contact local distributors/sales agents, buyers and businessmen, and to become familiar with local competition. In the case of new-to-market companies, be prepared to provide support for in-store and media promotions to familiarize consumers with your products. Another option is state/regional trade missions.
- If no shows are of interest plan a visit to talk to buyers, retailers, distributors and other players in order to prepare a more effective entry strategy.
- Investigate if you will be able to acclimatize your product to local preferences, if required; prepare product information/promotional material in Spanish and assign a specific budget to promote your product locally.
- Carry out background checks before entering into contractual agreements with potential importers.

Information on import regulations for exporting to the Mexican market are detailed in our annual Food and Agricultural Import Regulations and Standards Report; please review the latest edition, available at our Global Agriculture Information Network: http://gain.fas.usda.gov/Pages/Default.aspx

SECTION III. MARKET SECTOR STRUCTURE AND TRENDS.

A. Retail Sector.

Ever since the signing of the North American Free Trade Agreement (NAFTA) in 1994, retail trade has become more diversified and the quality of merchandise offered has improved in all types of formats. Foreign players, especially from the United States, have entered the Mexican market with different store formats, pushing Mexican retailers to modernize and expand their facilities. The main urban cities are well covered by several supermarket chains and now the strategy is to move out to smaller cities throughout the country and also to target specific, localized, high-end segments. Still, nearly 50% of the retail market is covered by informal establishments, such as street vendors and open public markets, which traditionally distribute local, domestic products.

According to the Mexican Association of Nationwide Retailers (ANTAD), for 2010, associated retail sales increased 5% over the previous year, at US$ 69 billion; projected sales for 2011 account for almost US$ 75 billion. Euromonitor estimates total retail sales for 2010 (including non-store retailing) at US$ 192 billion. Although still affected by the 2009 global crisis, the retail sector has fully recovered and its players are focusing on strengthening their positions, diversifying at established markets and developing new points of sale in "unchartered" territories, like small towns and rural communities. Fueled by convenience store openings, points of sale of the retail sector grow at an impressive rate of over 40% per year, and specialists agree there's still room to grow.

For a more specific and thorough analysis of the Mexican retail sector, please review our latest GAIN Retail Food Sector Report, available at our Global Agriculture Information Network: http://gain.fas.usda.gov/Pages/Default.aspx

B. Hotel, Restaurant, Institutional (HRI) Sector

Based on statistics published by the National Institute of Geography & Statistics (INEGI), Mexico has over 20,000 businesses registered as hotels, motels and other lodging facilities and more than 425,000 registered as restaurants, caterers, nightclubs, bars and other food preparation services.

U.S. suppliers continue to enjoy favorable market conditions as American restaurants and hotel chains expand operations in Mexico. U.S. products dominate imports with the main competition coming from local firms; of all food products consumed in hotels and restaurants, approximately 15% are imported. Independent distributors continue to be the main suppliers for the HRI sector; however, they have been experiencing greater competition from large club stores, which have been aggressively pursuing their share of this market, especially in the resort areas.

We have published specific reports that make a more complete examination of the Mexican HRI sector in some cases, for specific subsectors like restaurants or hotels; please review our collection of HRI Food Service Sector Reports, available at the Global Agriculture Information Network: http://gain.fas.usda.gov/Pages/Default.aspx

C. Food Processing Sector.

In Mexico, according to the National Institute of Geography & Statistics (INEGI), there are over 170,000 registered companies under the industry classification for food and beverage manufacturing/processing. Mexico has a relatively strong food processing industry, growing at a rate of almost 2%, and with a market value of nearly US$ 66 billion. Leading Mexican brands have well-developed national distribution networks and are well positioned in the market and enjoy high brand awareness with consumers, which are very loyal, despite economic variations.

Still, since a new class of Mexican consumer is demanding products that are healthy, convenient and innovative, food processors are adjusting to these new demands and seek innovative inputs or, in some cases, establish business relationships with foreign food processors in order to exchange technological innovation for their knowledge of the market. Although the majority of the food processing sector in Mexico is dominated by multinational (both domestic and foreign) corporations, there is a large and growing opportunity for small to medium companies to participate in this industry.

A more complete and exhaustive analysis of the food processing sector is available in our Food Processing Ingredients Report, available at our Global Agriculture Information Network:

http://gain.fas.usda.gov/Pages/Default.aspx

SECTION IV. BEST HIGH VALUE PRODUCT PROSPECTS

U.S. consumer-ready exports to Mexico have grown with record sales across many product categories such as poultry meat, dairy, fresh vegetables, processed fruit and vegetables, breakfast cereals and mixes, processed meat, wine and beer. In some cases (like wine, food preparations and beef), specialists and industry contacts refer that these markets can still grow larger, creating additional opportunities to U.S. exporters.

Product category	**2010 market size (Volume, in thousand MT, except where noted)** /1	**2010 U.S. imports (in million USD)** /2	**5-yr. avg. annual import growth (%)** /2	**Import tariff rate** /3	**Key constraints over market development**	**Market attractiveness for USA**
Meat [Bovine]	1,637.0	$ 644.07	25%	0	Lack of market access for some meat products, like ground beef.	
Meat [Swine]	1,093.8	$ 559.32	20%	0	Constant pressure from domestic producers, claiming unfair trade practices.	
Poultry	2,501.8	$ 595.02	15%	0	Ongoing antidumping investigation	Chicken is the meat most consumed by Mexicans, mainly due to price.
Milk Powder	89.1	$ 346.13	85%	0	Pressure from local producers to have additional regulation on milk and milk powder.	
Cheese	626.4	$ 187.43	25%	0	Because of high prices, a large segment of families cannot afford cheese in their diet.	Healthy eating trends create opportunities for cheese, especially for low-fat, calcium-enriched and lactose-free products.
Fresh Tomatoes	1,354.4	$ 72.04	40%	0	Tomato prices are highly volatile, depending on local production and exports. Greenhouse/shade production of tomatoes in Mexico is booming, but for export markets.	Healthy-eating promotional campaigns indirectly benefit U.S. fruits and vegetables.
Fresh Apples	715.6	$ 217.14	28%	0	Constant pressure from domestic producers, claiming unfair trade practices.	The awareness and maturity of the market creates an opportunity for non-traditional varieties. Also, healthy-eating promotional campaigns indirectly benefit U.S. fruits and vegetables.
Cookies, Wafers and other Bakery	576.6	$ 93.97	15%	0	Might be slightly affected by the recent law that forbids “junk food” within schools	Healthy eating affects this category. Companies are including low-calorie or vitamin-enriched varieties and using more dried fruits as ingredients.
Sauces	499.9	$ 120.04	18%	0	Cultural barriers might affect sauces that try to substitute traditional Mexican recipes.	Opportunities created for private label and presenting this market with new, innovative flavors to a more knowledgeable consumer.
Soups	36.5	$ 139.02	-6%	0	Soup is not popular amongst Mexican consumers; warm weather has some relation to this.	Opportunities created for private label and presenting this market with new, innovative flavors/ingredients.
Ready meals	45.6	$ 329.89	15%	0		Ready meals becoming more popular due to the demand for convenient inexpensive foods.
Wine	66.9 (million	$ 8.20		0	A special tax (IEPS) for alcoholic beverages ranges from 25% to	Consumption of wine has gained momentum. Wine consumption both

	liters)				53%, depending on the alcohol volume.	in restaurants and at homes is growing fast.
Beer	6,374.6 (million liters)	$ 84.45	9%	0	Domestic competition limits the access to foreign brands. A special tax (IEPS) for beer is set at 26.5%.	Consumer awareness and interest in new, different brands creates a niche for "specialty" beer. Women are emerging consumers of dark and light beer.

/1 Source: Euromonitor
/2 Source: USDA/FAS BICO Report and Post analysis
/3 Source: Secretariat of Economy (www.economia.gob.mx)

SECTION V. KEY CONTACTS AND FURTHER INFORMATION

The primary mission of the U.S. Agricultural Trade Offices (ATO) in Mexico City and Monterrey is to assist in the market development and promotion of U.S. food and agricultural products in the Mexican market. There are a wide variety of activities and services that the ATOs, along with other private sector representatives called "cooperators," make available to help develop U.S. agricultural interests in Mexico. If you have any questions or comments regarding this report or need assistance exporting U.S. food and beverage products to Mexico, please contact the ATOs in Mexico City or Monterrey.

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APPENDIX – STATISTICS

Table A. Key Trade & Demographic Information

Agricultural imports from all countries / U.S. market share[1/]	US$ 21,404.34 million / 72.93%
Consumer food imports from all countries / U.S. market share[1/]	US$ 8,971.91 million / 72.44%
Edible fishery imports from all countries / U.S. market share[1/]	US$ 501.02 million / 7.30%
Total population / Annual growth rate[2/]	112.33 million / 1.82%
Urban population / Annual growth rate[2/]	87.39 million / 2.10%
Number of major metropolitan areas (>1 million inhabitants)[2/]	12
Size of the middle class / Growth rate[3/]	54.62 million (2006) / 4%[8/]
Per capita Gross Domestic Product[4/]	US$ 9,521.65 (current prices)
Unemployment rate[4/]	5.373%
Per capita Food Expenditures[5/]	US$ 671.83

Percent of female population employed[6/]	39.75%
Exchange rate[7/]	US$ 1.00 = MXP 12.63

(All data is for 2010, except where noted)

1/ Source: Global Trade Atlas.
2/ Source: INEGI, 2010 Census.
3/ Used OECD definition of middle class: households with income between 50% and 150% of the national median; source: OECD
4/ Source: IMF World Economic Outlook Database, Sept. 2011.
5/ Source: INEGI, National Household Income & Expenditure Survey and 2010 Census.
6/ Percent against total number of women (14 yrs. old or above); source: INEGI, National Employment Survey and 2010 Census.
7/ Source: Mexico Central Bank, 2010 Monthly Average Exchange Rates.
8/ Source: Euromonitor.

Table B. Consumer Food & Edible Fishery Product Imports

Mexican Imports, by Category	Imports - World (in million USD)			Imports - U.S. (in million USD)			U.S. imports share (%)		
	2008	2009	2010	2008	2009	2010	2008	2009	2010
Consumer Oriented, Total	$ 9,708.72	$ 7,888.63	$ 8,971.91	$ 6,953.44	$ 5,675.26	$ 6,499.35	71.62	71.94	72.44
- Snack foods (excl. nuts)	$ 516.14	$ 417.24	$ 475.17	$ 280.62	$ 242.56	$ 283.06	54.37	58.13	59.57
- Breakfast cereals/Pancake mix	$ 61.93	$ 54.52	$ 68.88	$ 54.54	$ 48.16	$ 59.88	88.07	88.34	86.94
- Red meats, fresh/chilled/frozen	$ 2,299.70	$ 1,924.30	$ 2,285.47	$ 1,965.63	$ 1,644.55	$ 1,924.73	85.47	85.46	84.22
- Red meats, prepared/preserved	$ 241.82	$ 218.26	$ 258.23	$ 212.93	$ 194.15	$ 231.42	88.05	88.96	89.62
- Poultry meat	$ 748.66	$ 703.47	$ 821.42	$ 667.97	$ 633.83	$ 760.61	89.22	90.10	92.60
- Dairy products (excl. cheese)	$ 1,335.79	$ 897.57	$ 1,059.16	$ 809.19	$ 516.17	$ 651.23	60.58	57.51	61.49
- Cheese	$ 333.25	$ 261.85	$ 329.72	$ 191.88	$ 162.47	$ 208.19	57.58	62.05	63.14
- Eggs & products	$ 30.01	$ 33.47	$ 36.93	$ 29.94	$ 33.42	$ 36.67	99.76	99.84	99.31
- Fresh fruit	$ 591.06	$ 411.59	$ 488.17	$ 490.28	$ 340.50	$ 392.49	82.95	82.73	80.40
- Fresh vegetables	$ 205.44	$ 170.62	$ 209.28	$ 187.21	$ 151.37	$ 170.73	91.13	88.72	81.58
- Fruit & vegetable juices	$ 76.09	$ 57.18	$ 58.30	$ 41.99	$ 32.33	$ 34.84	55.19	56.54	59.76
- Processed fruit & vegetables	$ 656.94	$ 561.63	$ 600.58	$ 385.89	$ 311.66	$ 329.84	58.74	55.49	54.92
- Tree nuts	$ 160.53	$ 120.45	$ 115.87	$ 150.05	$ 109.36	$ 101.68	93.48	90.79	87.76
- Wine & beer	$ 297.83	$ 254.00	$ 271.23	$ 116.91	$ 104.62	$ 100.95	39.25	41.19	37.22
- Nursery products & cut flowers	$ 92.65	$ 72.39	$ 77.24	$ 43.73	$ 34.69	$ 36.64	47.20	47.93	47.44
- Pet foods (dog & cat food)	$ 92.48	$ 65.82	$ 48.96	$ 83.22	$ 56.11	$ 38.41	89.99	85.25	78.46
- Other consumer-oriented products	$ 1,968.41	$ 1,664.27	$ 1,767.37	$ 1,241.46	$ 1,059.30	$ 1,137.62	63.07	63.65	64.37
Fish & Seafood, Total	$ 559.73	$ 363.06	$ 501.02	$ 86.13	$ 38.14	$ 36.56	15.39	10.50	7.30
- Salmon	$ 7.78	$ 7.10	$ 9.82	$ 2.69	$ 2.46	$ 2.44	34.56	34.70	24.84
- Crustaceans	$ 136.23	$ 84.60	$ 111.18	$ 20.42	$ 8.41	$ 6.14	14.99	9.94	5.52
- Groundfish & flatfish	$ 25.06	$ 18.98	$ 25.41	$ 2.47	$ 0.40	$ 0.33	9.84	2.12	1.28
- Mollusks	$ 14.58	$ 12.22	$ 11.25	$ 4.51	$ 3.80	$ 4.05	30.92	31.14	35.99
- Other fishery products	$ 376.09	$ 240.17	$ 343.36	$ 56.05	$ 23.06	$ 23.61	14.90	9.60	6.87

Source: Global Trade Atlas

Table C. Top 15 Suppliers of Consumer Foods & Edible Fishery Products

C1. Mexico, Top 15 Suppliers of Consumer Oriented Agricultural (value in million USD)

2008		2009		2010	
United States	6,953.44	United States	5,675.26	United States	6,499.34
Chile	518.17	Chile	425.27	Canada	497.01
Canada	402.27	Canada	381.42	Chile	449.13
New Zealand	353.64	New Zealand	259.68	New Zealand	298.42
Uruguay	148.23	Argentina	117.90	Spain	116.41
Argentina	132.76	Uruguay	106.00	Argentina	110.16
Spain	130.04	Spain	103.91	Uruguay	95.72
China	122.87	China	88.32	Netherlands	88.05
Ireland	110.12	France	79.91	France	86.82
Netherlands	105.82	Netherlands	76.43	China	79.03
France	100.03	Italy	61.23	Italy	63.90
Italy	68.86	Ireland	53.23	Denmark	57.52
Denmark	59.41	Denmark	52.25	Germany	55.76
Germany	47.73	Sri Lanka	39.87	Ireland	54.50
Sri Lanka	47.12	Germany	39.86	Sri Lanka	45.32
Rest of the World	408.15	Rest of the World	328.02	Rest of the World	374.75
TOTAL	**9,708.72**	**TOTAL**	**7,888.62**	**TOTAL**	**8,971.91**

Source: Global Trade Atlas

C2. Mexico, Top 15 Suppliers of Fish and Seafood Products (value in million USD)

2008		2009		2010	
China	121.57	China	99.33	China	172.44
United States	86.13	Vietnam	61.28	Vietnam	79.12
Vietnam	62.86	Chile	41.32	Chile	43.72
Chile	45.68	United States	38.13	United States	36.55
Thailand	40.80	Guatemala	18.96	Guatemala	21.20
Guatemala	26.14	Thailand	13.70	Norway	19.47
South Korea	22.69	Norway	11.31	Honduras	11.40
Norway	20.57	Belize	7.95	Thailand	9.97
Taiwan	17.29	Spain	7.10	Nicaragua	9.89
Indonesia	14.06	Indonesia	6.59	Taiwan	9.78
Venezuela	11.03	Honduras	6.52	Marshall Islands	8.63
Honduras	10.89	Costa Rica	5.49	Indonesia	7.72
Spain	9.68	Taiwan	5.43	Belize	6.84
Costa Rica	9.00	Venezuela	4.94	Spain	6.68
Ecuador	8.87	Canada	4.76	Costa Rica	6.43
Rest of the World	52.47	Rest of the World	30.25	Rest of the World	51.18
TOTAL	**559.73**	**TOTAL**	**363.06**	**TOTAL**	**501.02**

Source: Global Trade Atlas

ADDITIONAL INFORMATION

Other Relevant Reports Submitted by FAS/Mexico:

Report #	Subject	Date Submitted
MX0347	HRI Food Service Sector 2011 – Restaurant Industry	01/05/12
MX0346	Retail Food Sector 2011	01/04/12
MX0345	Food Processing Ingredients Sector 2011	01/02/12
MX0344	FAIRS Country Report 2011	12/30/11
MX1076	Mexico Eliminates Trucking Retaliation Tariffs against Ag. Products	10/24/11
MX1042	Market Concentration in Selected Agricultural and Food Subsectors	05/30/11
MX1512	Exporting to Mexico - Managing Border Entry Issues	04/20/11
MX1509	Principal Border Entry Points for U.S. Agricultural Exports - UPDATE	03/14/11

FAS/Mexico Web Site: We are available at: http://www.mexico-usda.com or visit the FAS headquarters' home page at: http://www.fas.usda.gov for a complete selection of FAS worldwide agricultural reporting.

Useful Mexican Web Sites: Mexico's equivalent to the U.S. Department of Agriculture (SAGARPA) can be found at http://www.sagarpa.gob.mx and Mexico's equivalent to the U.S. Department of Commerce (SE) can be found at http://www.economia.gob.mx. These web sites are mentioned for the readers' convenience but USDA does NOT in any way endorse, guarantee the accuracy of, or necessarily concur with, the information contained on the mentioned sites.